

# Setting Up Vendors in Sytewise

Vendors are at the center of how work gets done in Sytewise. Before you can issue a work order, assign a checklist, or track who serviced what, the vendors doing that work need to be in the system. This article covers every way to add vendors, how to organize their contacts, and why assigning default vendors to your property trades is one of the most time-saving things you can do.

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## Three Ways to Add Vendors

### Add Vendors One at a Time

The **Vendors** page has a collapsible **Create A New Vendor** section. Fill it out and you have a vendor in the system.

Required fields:

- **Company Name** — must be unique in your account
- **Phone Number** — primary contact number for the company
- **Company Email** — the main inbox for this vendor
- **Login Username** — the vendor's credential for accessing their portal
- **Password** — at least 8 characters, one capital letter, and one number
- **Address** — the vendor's physical business address

Before you can save the record, you need to click **Lookup Geolocation**. This validates the address through Google Maps and stores the coordinates used for distance-based vendor searches. The **Create Vendor** button won't appear until that step is done, so don't skip it. Vendors can have multiple address in the system.

Optional fields include a **Description** and a **QuickBooks ID** if your account uses QuickBooks for accounting reference.

### Import Vendors from a CSV

If you're bringing a vendor list over from a spreadsheet or another system, the **Import Vendors List** section on the Vendors page accepts a CSV upload. The required columns are Company Name, Email, and Phone. Address, Description, Username, and Password are optional. If a username or password isn't included, Sytewise generates one automatically.

A sample CSV file is available to download directly from the import section so you can see the expected format before you build your file.

## Import from the Sytewise Vendor Network

Sytewise maintains a broader vendor network shared across accounts. If a vendor you work with is already in the system from another account, the **Import Sytewise Vendors** section lets you search for them by name and add them directly to your account without re-entering their information.

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## Building Out a Vendor Record

Once a vendor is created, their detail page is where the full picture lives. A few things worth setting up here before you start issuing work:

**Contacts** are the people at the vendor company who receive communications. Work order emails and checklist notifications go to vendor contacts, not just the generic company email. Add the right contacts and the right people get notified automatically when jobs are assigned.

**Insurance and W-9** tracking is built into every vendor record. If a vendor has a current insurance certificate on file, a badge appears on their record and on the vendor list so you can see coverage status at a glance without digging. Same for W-9 status. No more spreadsheets tracking who sent their cert and who hasn't.

**Working Trades** shows which trades this vendor has performed or been assigned to. This builds over time as work orders are issued and completed.

**Alternate Vendors** can be added to a vendor record for situations where the primary vendor is unavailable. Having alternates ready means you're never stuck searching for a backup when the regular vendor can't make it.

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## Default Vendors: The Part Worth

# Getting Right

Here's where the real efficiency lives. In Sytewise, vendors aren't just assigned to properties — they're assigned to specific **trades within a property**. That combination, a property plus a trade, can have a **default vendor** that Sytewise uses to pre-fill work orders automatically.

When you open the new work order modal for a property, Sytewise looks at which trade the work order is for and fills in the default vendor for that trade automatically. The vendor field arrives pre-populated with the right company, and their contacts load up ready to select as email recipients. You don't have to search, you don't have to remember who handles HVAC at that building. It's just there.

This matters more as your portfolio grows. A property with ten trades and a different vendor for each one becomes a mental load fast. Default vendors eliminate that load entirely for the routine case.

## How to Assign a Default Vendor to a Trade

**When adding a new trade to a property:** The New Trade modal includes a vendor search field right in the form. Select the trade, search for the vendor, and both are saved together. The default vendor is set from day one.

**For an existing trade:** On the property detail page, click into the trade tab, find the **Vendor** card, and click **Change Vendor**. Search by name, select the vendor, and the assignment updates immediately.

**Find vendors by distance:** Not sure who's closest? The Vendor card on a property trade lets you search for vendors by proximity: 10, 25, 50, 100, or 250 miles from the property. Results come back ranked by distance so you can make an informed choice before assigning.

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## Why Default Vendors Pay Off

The short version: every work order you create for a property trade with a default vendor set takes one fewer decision. The vendor is pre-selected, their contacts are loaded, and you move straight to describing the work and setting the due date. Also, if anyone has to pinch hit for your projects, the vendor you have a relationship with is a known quantity.

Multiply that across every work order your team issues in a month and it adds up quickly. More importantly, it reduces the chance that a work order goes to the wrong vendor because someone picked from a list in a hurry.

If the default vendor ever changes because of a new contract or a better relationship with a different company, updating the property trade record takes fifteen seconds. Every future work order for that trade at that property picks up the new default automatically.

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